

California Accountability and Improvement System Fact Sheet 2: How to Upload Documents

1. On the Instrument Overview page, select a program instrument item.

The screenshot shows the 'Instrument Overview' page with tabs for 'Items (35)', 'Documents (1)', and 'Status History (1)'. A 'Print Instrument Report' button is in the top right. Below the tabs, there's a yellow box labeled 'CATEGORY: I. Involvement'. Below that, a list of items is shown. The first item, 'ITEM: I-CE 01: LEA Parent Involvement Policy', is highlighted with a red arrow pointing to it. The status 'In Progress' is shown to the right of the item name. Below it, another item 'ITEM: I-CE 02: School Parent Involvement Policy' is also shown with a status of 'In Progress'.

2. On the Item Overview page:

A) **Associated Documents tab.** Associated documents link to other items within the program instrument or other program instrument items.

B) To upload Associated Documents, select “Respond.”

The screenshot shows the 'Item Overview' page for 'II-CE 04: Monitoring the LEA Plan'. The page has tabs for 'LEA Overview', 'Monitoring', 'Plan', 'LEA File Cabinet', and 'Plan Tags'. Below the tabs, there's a breadcrumb trail: 'Home > 2012-13 Training LEA - 12341234567890 > Compensatory Education 2012-13 > Monitoring the LEA Plan'. The 'ITEM OVERVIEW' section shows the item name and a status of 'In Progress'. Below this, there's a section for 'INSTRUMENT ITEM' with a description. Further down, there's a section for 'LEA SELF-REVIEW SELF-REVIEW' with a status of 'In Progress' and a button labeled 'Edit'. At the bottom, there's a table of 'Associated Documents (6)'. A red arrow labeled 'A' points to the 'Associated Documents (6)' tab. Another red arrow labeled 'B' points to the 'Respond' button in the first row of the table. The table has columns for 'Respond', 'Evidence Name', 'Description', 'Associations', and 'Attached Documents'.

Respond	Evidence Name	Description	Associations	Attached Documents
Respond	CE student academic assessment data and reports' summary [r]	CE student academic assessment data and reports' summary [r]	2	
Respond	LEA Plan [r]	LEA Plan [r]	24	
Respond	LEA Plan Addendum [r]	LEA Plan Addendum [r]	2	
Respond	LEA Program Evaluation [r]	LEA Program Evaluation [r]	4	

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- C) **All Documents tab.** Required documents are referenced in the program instrument item and have an [r] following the document title. Suggested documents may demonstrate an LEA meets legal requirements and have an [s] following the document title. These documents are listed under Document Name.
- D) To upload Required or Suggested Documents or for any other related documents, select “Attach Document.”
- E) Under the Uploaded Documents section, district users can view and manage all documents uploaded for the selected instrument item, including documents uploaded in the Associated Documents tab.

The screenshot shows the CAIS interface with several tabs: Associated Documents (1), All Documents (1), Resources (0), Legal Citations (0), and Status History (1). A red arrow labeled 'D' points to the '+ Attach Document' button. Another red arrow labeled 'C' points to the 'All Documents (1)' tab. Below the tabs, there are two sections: 'Associated Documents' and 'UPLOADED DOCUMENTS'. The 'UPLOADED DOCUMENTS' section has a table with columns: Edit, Open, Size, Title, Description, Evidence Request, Updated, and By. A red arrow labeled 'E' points to the 'Open' button in the first row of the 'UPLOADED DOCUMENTS' table. The first row shows a document titled 'www.test.ca.gov' uploaded on 09/27/2012 by Training User (LEA).

- F) Paperclip icons are located throughout CAIS for navigational purposes and to provide a filtered view of the LEA file cabinet. Do not use these icons to upload documents.

The screenshot shows the 'INSTRUMENT OVERVIEW' page for '2012-13 Training LEA - 12341234567890'. It includes a 'Compensatory Education 2012-13 (CE)' section with status 'In Progress', due date, last update, and items count. There are also sections for 'Team Leader', 'LEA Submitters', and 'SEA Reviewers'. A '2012-13 TRAINING LEA REVIEW' section shows dates and school information. At the bottom, there are tabs for 'Items (35)', 'Documents (1)', and 'Status History (1)'. A red arrow labeled 'F' points to a paperclip icon in the 'Documents (1)' tab. Another red arrow labeled 'F' points to a document icon in the 'ITEM: I-CE 01: LEA Parent Involvement Policy' section.

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3. On the Add New Document page:

- A) Select one of the four types of document to be uploaded: “New File”, “Existing File”, “Link to a web page URL”, or “Hard copy reference only.”
- B) Mark any confidential information, including student-identification, as “Hard copy reference only.” In the Description box (D), provide the location at the LEA where the confidential information can be reviewed by CDE staff during an on-site review.
- C) After the document is uploaded, insert a title for the document. New files default to the file name of the selected document.
- D) Provide a description for the uploaded document. If the document is not an Associated Document, begin the description with the program instrument item number. For larger documents, please indicate the relevant page number.

The screenshot shows the 'ADD NEW DOCUMENT' page in the California Accountability and Improvement System. The page has a green header with 'LEAs List', 'Current LEA: 2012-13 Training LEA - 12341234567890', and 'Setup & Maintenance'. Below the header is a navigation bar with 'LEA Overview', 'Monitoring', 'Plan', 'LEA File Cabinet', and 'Plan Tags'. The main content area has a breadcrumb trail: 'Home > File Cabinet > Attach Document'. The title 'ADD NEW DOCUMENT' is in green. The form has a yellow background and contains the following fields:

- Title:** LEA Parent Involvement Policy [r]
- Associations:** I-CE 01: LEA Parent Involvement Policy
- Description:** LEA Parent Involvement Policy [r]

Below the form is the 'Select Document Type' section with four radio button options:

- ☒ New File *Please do not upload documents that contain student-identifying or otherwise sensitive information.* [Browse...] *File size limit: 50 MB Allowed file types .docx,.doc,.xlsx,.xls,.pdf,.txt,.ppt,.pptx*
- ☐ Existing File
- ☐ Link to a web page URL
- ☐ Hard Copy Reference Only

Below the radio buttons is the 'Title *' field with a checkbox 'Use Filename' and a text input field containing 'LEA Parent Involvement Policy [r]'. The character count '33/100' is shown to the right of the field.

Below the title field is the 'Description:' field with a text area containing 'LEA Parent Involvement Policy [r]'. The character count '0/500' is shown to the right of the field.

Red arrows labeled A, B, C, and D point to the following sections:

- A: Select Document Type
- B: Radio button options
- C: Title field
- D: Description field

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4 When uploading documents:

- A) Verify that the “Draft” box remains un-checked. Checking the draft box will prevent CDE staff from reviewing the submitted documents.
- B) Select the school associated with the document from the school list.
Note: If a document pertains to the LEA, do not select a school.
- C) When documents are ready to be uploaded, select Attach.

The screenshot shows a web form for uploading documents. At the top is a 'Description:' label and a large text area with a '0/500' character count. Below this is a 'Draft' checkbox, which is currently unchecked. A red arrow labeled 'A' points to this checkbox. Below the checkbox is a note: 'Draft documents may not be downloaded by CDE. Be sure to un-check the Draft box before submitting the instrument.' Below the note is a 'School Associations:' section containing a list of three schools, each with an unchecked checkbox: 'Blue Elementary School - 45454545454545', 'Green School - 56565656565656', and 'Yellow School - 67676767676767'. A red arrow labeled 'B' points to the 'Green School' entry. At the bottom of the form are two buttons: 'Attach' and 'Cancel'. A red arrow labeled 'C' points to the 'Attach' button. A red arrow labeled 'B' also points to the 'Attach' button.

A → ☐ Draft

Draft documents may not be downloaded by CDE. Be sure to un-check the Draft box before submitting the instrument.

B → **B**

School Associations:

- ☐ Blue Elementary School - 45454545454545
- ☐ Green School - 56565656565656
- ☐ Yellow School - 67676767676767

C → **B**

[Cancel](#)